

ADDED

VALUE

A SINGLE PROVIDER FOR YOUR RETIREMENT AND EMPLOYEE BENEFITS

Your employees probably buy their home and auto insurance from the same company for convenience and cost savings. Shouldn't you get the same value for your workplace benefits?

More than 30% of workers say they've taken some form of a loan, early withdrawal, and/or hardship withdrawal from their 401(k), similar plan, or IRA. Of that group, about one in five cited medical expenses as the reason.¹

Employers can help retirement plan participants protect their long-term savings by offering an array of health-related solutions on one platform.

With an assist from Transamerica, employers and their advisors/brokers have the unique opportunity to offer an integrated experience that allows employees to simultaneously prepare for retirement and protect themselves in case of the unexpected.

THE BENEFITS OF BUNDLING

A bundled solution brings retirement plans and employee benefits together from one provider. This approach offers several benefits for employers and employees:

- One familiar and trusted carrier to engage with
- Potential for increased enrollment in voluntary benefits and increased participation in retirement plans
- Improved workforce management by helping employees retire on time
- Less stress and increased productivity when employees aren't distracted by finances



TRANSAMERICA®

WHAT EMPLOYER GROUPS DOES THIS WORK BEST FOR?

All employers (and their employees) can benefit from bundling Transamerica retirement and voluntary benefit solutions. Simplifying benefits administration can improve the employee experience and reduce costs for employers. Employers who have at least 250 employees are best-suited to take advantage of a bundled solution. The ability to view all benefits on one platform are tied to certain requirements.

BUNDLE BREAKDOWN

Here's a look at how organizations can take advantage of a one-stop bundling platform:

At least 250
employees



Retirement
Recordkeeping



OFFER ONE OF THE
FOLLOWING TRANSAMERICA
VOLUNTARY BENEFITS:

- Hospital indemnity insurance
- Critical illness insurance
- Accident insurance
- Life insurance

WHY TRANSAMERICA?

We're committed to helping people prepare for every part of their future and leading the charge to show plan sponsors and their participants how healthcare expenses and retirement planning are undeniably linked.

RETIREMENT

85

YEARS EXPERIENCE

TOP 10

RETIREMENT RECORDKEEPING²

\$250B

IN RETIREMENT PLAN ASSETS⁴

EMPLOYEE BENEFITS

~90

YEARS EXPERIENCE

TOP 10

IN HEALTH SALES³

1MM

EMPLOYEE BENEFITS POLICIES IN FORCE⁵

Learn more about our bundled solutions.



Visit: transamerica.com



Call: 800-851-7555 option 4

¹"20th Annual Transamerica Retirement Survey of Workers," nonprofit Transamerica Center for Retirement Studies®, May 2020

²2020 PLANSPONSOR Recordkeeping Survey (As measured by total defined contribution plan participants through December 31, 2019.)

³LIMRA, 3Q 2020 Worksite Voluntary Report

⁴As of December 31, 2020

⁵As of 4Q 2020

Insurance products underwritten by Transamerica Life Insurance Company or its affiliates.
All Transamerica companies identified are affiliated.

